Downloaded from <https://www.velvetjobs.com/job-descriptions/client-services-specialist>

# Example of Client Services Specialist Job Description

Our innovative and growing company is looking to fill the role of client services specialist. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for client services specialist

* Manage and build client relationships to ensure high level of satisfaction
* Providing clients with a consistent and trusted point of contact
* Initiative in assisting with the delivery of wealth management and investment advice solutions to clients and bankers
* Proactively driving task management and enhancing relationships internally with Client Service team members, Private Bank colleagues, Private Bank Operations and with various key stakeholders across the broader BFS group
* Receive new/renewal submission from the production team or client
* Send the submission to carriers
* Carry out surplus lines, market security, sanctions, and third party payment procedures
* Receive quotes and update renewal document(s) as needed
* Create the base WEM presentation for the broker
* Provide orders to bind to the carrier/underwriters

## Qualifications for client services specialist

* Experience with loss sensitive programs and international exposures
* Ability to provide consultation and expert advice on risk management issues
* Ability to work independently and in a team setting and delegate work as appropriate
* Related professional designations preferred but not required
* Requires ability to meet deadlines without sacrificing accuracy and attention to detail the ability to work independently, problem solve and provide expert advice and consultation on risk management issues in a fast paced, dynamic environment
* Experience with Middle to Large enterprise accounts – preferably in the Real Estate Industry